

TAX CONSULTATION AND PLANNING RETAINER AGREEMENT

This Tax Consultation and Planning Retainer Agreement (the "Agreement") is entered into and made effective as of _____, by and between:

Client: _____
Address: _____
Phone: _____ | Email: _____

And

Tax Consultant: _____
Address: _____
Phone: _____ | Email: _____

1. ENGAGEMENT OF SERVICES

The Client hereby retains the Tax Consultant, and the Tax Consultant agrees to provide professional tax consultation and planning services. The scope of services shall include, but is not limited to:

1. Ongoing tax planning, advisory, and consultation services.
2. Review of financial records and transaction structures to optimize tax efficiency.
3. Analysis of federal, state, and local tax implications of proposed transactions.
4. Any other related tax advisory services mutually agreed upon by both parties.

2. RETAINER AND FEES

As consideration for the services to be performed by the Tax Consultant, the Client agrees to pay fees as follows:

1. **Retainer Fee:** Upon execution of this Agreement, the Client shall pay a non-refundable retainer fee of \$ _____ . This retainer shall be applied against the initial billings for services rendered.
2. **Hourly Rates / Fees:** Services outside the initial retainer scope, or once the retainer is exhausted, shall be billed at an hourly rate of \$ _____ per hour, or in accordance with the following fee schedule:

3. **Billing and Payment:** Invoices shall be submitted monthly by the Tax Consultant and shall be due and payable within _____ days of receipt.

3. CLIENT RESPONSIBILITIES AND OBLIGATIONS

The Client agrees to provide the Tax Consultant with all necessary financial, accounting, and personal information required to perform the services in a timely, accurate, and complete manner. The Tax Consultant shall not be responsible for any errors, omissions, or penalties resulting from inaccurate or incomplete information provided by the Client.

4. TERM AND TERMINATION

This Agreement shall commence on the effective date and shall continue:

- Until _____ .
- Until the completion of the designated services.
- On a month-to-month basis until terminated by either party.

Either party may terminate this Agreement at any time by giving _____ days written notice to the other party. Upon termination, the Client shall pay the Tax Consultant for all services rendered and expenses incurred up to the date of termination.

5. CONFIDENTIALITY

The Tax Consultant agrees to keep all proprietary, financial, and personal information of the Client strictly confidential and shall not disclose such information to any third party without the prior written consent of the Client, except as required by law.

6. LIMITATION OF LIABILITY

The Tax Consultant's liability for any claim, loss, or damage arising out of this Agreement shall be limited to the total amount of fees paid by the Client to the Tax Consultant under this Agreement.

7. GOVERNING LAW

This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of _____, without regard to its conflict of law principles.

8. ENTIRE AGREEMENT

This Agreement constitutes the entire understanding between the parties and supersedes any prior written or oral agreements. No amendment to this Agreement shall be effective unless made in writing and signed by both parties.

IN WITNESS WHEREOF, the parties hereto have executed this Retainer Agreement as of the date first written above.

CLIENT:

TAX CONSULTANT:

Signature

Signature

Printed Name

Printed Name

Title (if applicable)

Title (if applicable)

Date

Date